

MONTANA PARTNER LIBRARIES

STANDARD OPERATING PROCEDURES

Participating libraries

Bitterroot Public Library
Drummond School and Community Library
Flathead County Libraries
Glendive Public Library
Hearst Free Library
Miles City Community College
Miles City Public Library
Missoula Public Library and branches
North Valley Public Library (9/07)
Polson City Library

| Revised 9/18/06; 9/19/06; 10/17/06; 6/20/07

Checkout periods

- 1) 28 days, no grace period, 1 renewal, 10 cents fine/day
- 2) 10 days, no grace period, 1 renewal, 10 cents fine/day for new and short-term items as determined by the Partner library.

Renewal policy

Two renewals, if item is not on hold for another patron.

Holds

- Patrons may place up to 40 holds. No priority is given to any library or patron. All holds are processed on a first come, first served basis.
- Patrons are notified of available holds within 24 hours, via phone, email or mail.
- Staff must check the **Onshelf Items with Holds report** daily and take appropriate action.
 - i. If an item is not on the shelf:
 - Search for a maximum of two days
 - To force the hold to another Partner libraries copy, check the item out to trace
 - If your library has the only copy and the hold is for your library's patron, remove the hold and notify the patron
 - If the patron belongs to another library, let that library know so they can notify their patron.
 - ii. If a patron presents an item for checkout that has an onshelf hold, proceed with checkout by using the hold override. The hold patron will remain first in the hold queue
 - iii. Crate packing requirements:
 - When crates include materials for more than one library, items must be banded together and clearly marked according to their destination library
 - All crates must be secured with bungee cores and clearly labeled lids
- Staff must check the **Expire Holds and Clean Holds Shelf reports** daily.
- An **Expire Inactive Holds** report runs monthly for each library. This report cancels/expires holds that have been inactive or unfilled for six months.
- Items are held for eight days. The hold is then expired in the system.
- To pick up a hold for someone other than themselves, patrons must have either the library card or hold pickup notice of the patron whose hold is being picked up (e.g. spouse, friend). Holds may not be picked up using another patron's library card.
- In lieu of their library card, patrons may use photo ID to check out materials/holds.
- Patrons may elect to pick up their holds at any Partner library. Staff will not change pick up location of holds unless asked to do so by patron. If the pickup location of an available hold is changed,

contact the library where the item is currently being held so it can be rerouted accordingly.

- Items may be returned to any Partner library, regardless of where they were checked out.

Receiving Partner items

- Use the Discharge (checkin) wizard.
- If item is scanned and the option "Release item" appears, choose "Do Not Release Item". This means the item needs to continue its journey to another library.
- If item's "Route/Transit to" location is FLOAT-RET, discharge item again.

Missing AV items

- If a patron returns an item that is missing one of its pieces, call the patron and ask that they return the missing piece (tape, CD, etc.) ASAP.
- Patron has one month to return the missing item. At that time he/she will be billed for the missing part or the entire set, whichever the owning library requires.
- If the patron belongs to another library, ask that library to contact the patron and follow through in retrieving missing materials. (Only the patron library can modify the patron account to add extended info notes about having called patron, etc.)
- Keep incomplete items where they were returned until the issue is resolved.

Maintaining patron records

- Database entry guidelines must be adhered to by all libraries. Check out the MSC patron registration guidelines at <http://montanalibraries.org/MSCLNmln-home.htm>
- Maintenance of patron records must be done at the home library

Checkout limits/circulation rules/billing structure

- Unlimited number of items may be checked out.
- Fines are 10 cents per day, per item.
- Patrons are blocked from checking out if their estimated or actual fine is \$10.00 or more. While we encourage patrons to pay their fines and charges at their home library, fines under \$10.00 are payable at any library within the Partnership. Fines paid remain at the collecting library.
- If a patron wants to check out items at another Partner library and their account is blocked, staff can place holds on the items, choosing the patron's home library as the pickup location. The Partner library can then trap the holds and send the items to the patron's home library for pick up.

- Patrons may register for a library card at any of the Partner libraries regardless of their status at their home library.
- Patrons may return Partner items at any Partner library.

Overdue items/damaged, lost & long overdue items

- Patrons who have overdue materials may still check out, provided the estimated or accrued fines are under \$10.00.
- If an item belonging to another library is returned damaged or in need of repair, return the item to its home library and await notification of charges. Patron will be billed accordingly and payments will be kept by the collecting library.
- If a patron claims to have lost an item belonging to another library follow these steps:
 - i) Contact the lending library to determine replacement cost and processing fees
 - ii) Mark item lost using above dollar amounts*
 - iii) Collect money from patron and clear their account
(*The lending library can also mark the item lost)
- If a lost item from another library is returned, refunds are not available.

Claims return process

- Always check the shelves before sending an item to claims return.
- When using the claims return wizard, the system asks for a date that the item was supposedly returned. Use the actual due date to prevent fines from being assessed and overdue notices from being generated.
- Claims returns will be looked for once a week for a period of three months.
- If the item has not been found within three months, mark it as lost using the mark item lost wizard and waive the charges. Partner libraries agree that it is not necessary to remit payment for claims return to lost charges.

Floating collections

- Floating new adult fiction materials remain at the library where they are returned until they are called upon again through the hold process.
- If a floating item needs attention from the owning library follow these steps:
 - place a hold for the item using the Float item return user
 - choosing the owning library for pickup
 - trap the hold and route accordingly
 - attach a note to item explaining what attention is needed
- When a floating item is returned to a non-floating library, that library will check the item out to the OWNING library's float user record

before sending the item back. Upon arrival the owning library may need to discharge the item twice.

- When a new floating book is 6 months old and needs to be changed over by the owning library, check the item out to the OWNING library's float user.
- Every month MSC system administration will send out a report of items that have reached their 6 month limit. Libraries can pull items using this list, or they may use the date added marking on the book to determine when items need to be sent back.

Adding items to the system

- New items may be added to the system 6 months before their publication date.

MONTANA SHARED CATALOG PATRON REGISTRATION

Follow the Post Office address recommendations, which include the following:

- 1) Enter data in ALL CAPS.
- 2) Do not use punctuation.
- 3) Exceptions to the above are:
 - a hyphen in full (+4 digits) zip codes (59803-4799)
 - a comma between patron's last name and first name (SMITH, JOHN)
 - Use address abbreviations wherever possible (AVE ST LN DR RD)

WORKFLOWS PATRON REGISTRATION (data entry issues)

- *Always check through "User Display" to see if the user already has a card.*

- 1) Enter patron's name as follows: SMITH, DEBORAH L
(note: no period after middle initial)
- 2) Tab through/ignore the "title" field.
- 3) Alternate ID: 6-10 character ID determined by patron to access their iBistro account; may be used in lieu of library card number.
- 4) Group ID: Phone number. Enter as (000)000-0000 with no spaces; schools may want to use for homeroom numbers.
- 5) Address hints:
 - All mailing addresses (incl. PO BOXES) go in address 1.
 - If patron has a mailing address that is different from their physical address, use address 2 for the physical address. Address 2 might also be used for a permanent out-of-state address, if patron has a temporary in-state address.
 - Include apartment/suite numbers on same line as the street address. Too many lines in the address can tamper with the alignment of printing on overdue notices.

Here are two examples of registration data entry:

JOHNSON, ROBERT E	ROGERS, DAWN
PO BOX 2156	530 S 14 TH ST W
MISSOULA MT	MISSOULA MT
59808-2156	59801
ROBBIE678@YAHOO.COM	
(pay attention to case sensitivity in email addresses)	

- 6) Staff initials: enter in department field (can track through reports)
- 7) Avoid using social security numbers

EMAIL NOTIFICATION:

- **Enter email address in address 1; watch for case sensitivity**
- **Enter E in NOTIFY_VIA field in extended info**
- **Email notices are sent from the following address:**
sirsi@mt.gov

MSC PARTNER LIBRARIES (June 21, 2007)

MSC CODE	LIBRARY	BAR CODE	CONTACT	E-MAIL	TELEPHONE
BITTERROOT	Bitterroot Public Library (Hamilton) 306 State Street, Hamilton, MT 59840-2759	_ 9 5 2 5	Nansu Roddy Gloria Langstaff, Director	nansu@montana.com glolang@montana.com	375-0386 375-0386
DRUMMOND	Drummond School/Community 108 W. Edwards, Drummond, MT 59832 PO Box 349, Drummond, MT 59832	_ 3 2 8 5	Jodi Oberweiser, Director	librarydhs@blackfoot.net	288-3281
FCL-MAIN	Flathead County Library (Kalispell) 247 1st Ave. E., Kalispell, MT 59901-4598	_ 3 2 3 6	Patty Jones Julie Marotz (Holds) Kim Crowley, Director	pjones@co.flathead.mt.us jmarotz@co.flathead.mt.us kcrowley@co.flathead.mt.us	758-5818 758-5819 758-5826
FCL-BF	Bigfork Branch				
FCL-CF	Columbia Falls Branch				
FCL-MAR	Marion Branch				
FCL-WF	Whitefish Branch				
GPL	Glendive Public Library 200 South Kendrick, Glendive, MT 59330-1629	_3384	Gail Nagle, Director Dawn Kingstad Susan Germann	gnagle@midrivers.com booksrus@midrivers.com	377-3633 377-3633 377-3633
HFL	Hearst Free Library (Anaconda) 401 Main Street, Anaconda, MT 59711-2437	_ 7 4 5 5	John Finn, Director Colleen Ferguson	jfinn@mtlib.org cferg@mtlib.org	563-5393 563-6932
MCC	Miles City Community College Miles City Community College Library 2715 Dickinson Street, Miles City, MT 59301	_ 9 5 5 2	Ann Rutherford, Director Front Desk	rutherforda@milesc.edu library@milesc.edu	874-6196 874-6105

MCPL	Miles City Public Library One South Tenth Street, Miles City, MT 59301	_ 0 8 7 2	Sonja Woods, Director	mcpl@midrivers.com	234-1496
MSLA-MAIN	Missoula Public Library 301 E. Main, Missoula, MT 59802-4799	_ 3 1 4 4	Claire Morton Brianna Huffman (Holds/In Transit) Honore Bray, Director	claire1@missoula.lib.mt.us bhuffman@missoula.lib.mt.us hbray@missoula.lib.mt.us	258-3866 258-3860
MSLA-SL MSLA-SV	Seeley Lake Branch Swan Valley Branch				
NVPL	North Valley Public Library 208 Main Street, Stevensville, MT 59870	_9517	Renee McGrath, Director Carrie Hearn	reneemcgrath@northvalleylibrary.org carriehearn@northvalleylibrary.org	777-5061
POLSON	Polson City Library PO Box 820, Polson, MT 59860	_ 9 5 2 3	Marilyn Trosper, Director Circulation	mtrosper@polson.lib.mt.us polsoncl@polsonlib.mt.us	883-8225 883-8225